

construction engineering research laboratory

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Improvements to Procedures for Deriving Functional Requirements From Organizations and Individuals

A PROTOTYPE PROCEDURE FOR THE LOCAL GENERATION OF FACILITY REQUIREMENTS

4A762719AT41

David L./Dressel, Roger L./Brauer Wayne D./Veneklasen John H./Burgess

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#### **FOREWORD**

This research was conducted for the Directorate of Military Construction, Office of the Chief of Engineers (OCE), under Project 4A762719AT41, "Design, Construction, and Operation and Maintenance Technology for Military Facilities"; Task T3, "Architectural Research and Development in Support of Military Facilities"; Work Unit 001, "Improvements to Procedures for Deriving Functional Requirements From Organizations and Individuals." The applicable QCR is 1.01.012. The OCE Technical Monitors for this study were Robert Shibley and Richard Cramer.

The work was performed by the Architecture Branch (HPA), Habitability and Planning Division (HP), U.S. Army Construction Engineering Research Laboratory (CERL), Champaign, IL. Principal Investigators were Dr. Roger L. Brauer and Mr. John H. Burgess; associate investigators were Messrs. David L. Dressel and Wayne D. Veneklasen. Program review of this work and report was provided by Mr. Robert Porter, Chief of HPA and Dr. Robert Dinnat, Chief of HP.

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COL James E. Hays is Commander and Director of CERL and Dr. L. R. Shaffer is Technical Director.

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# A PROTOTYPE PROCEDURE FOR THE LOCAL GENERATION OF FACILITY REQUIREMENTS

## 1 INTRODUCTION

#### **Background**

Evaluation of the impact of Military Construction, Army (MCA) building delivery procedures on the performance quality of facilities has indicated that using organizations need tools and methods to help them systematically identify functional requirements for facilities they will occupy in the future. Functional requirements-statements of how a facility is to perform -have been recognized as essential information on which to base the numerous decisions required in developing and designing a facility. This recognition was partially responsible for initiation of the Project Development Brochure (PDB-1). As installations began to submit PDB-1s for facilities in the MCA program, however, the difficulties experienced by using services in formulating functional requirements became apparent. These difficulties resulted in initiation of research at the U.S. Army Construction Engineering Research Laboratory (CERL) to develop tools and procedures for organizations at the installation level to use in formulating functional requirements.

#### **Objectives**

The objectives of this research are (1) to develop the tools and procedures required by using organizations at the installation level to formulate functional requirements for installation facilities, (2) to put those requirements in a form compatible with the existing or a revised PDB-1 format, and (3) to develop training materials necessary to implement the procedure.

#### Approach

The three phases planned for accomplishing the objectives are (1) formulation of a prototype procedure for generating facility requirements through field development studies; (2) field testing of the prototype using installation personnel responsible for stating functional requirements, revision of input forms as necessary, and development of an appropriate output format; and (3) development of a training plan and the training materials necessary to execute the procedure at installations. This report describes the prototype procedure for requirement generation developed during the first phase of this project.

#### Prototype Development Objectives and Approach

The objectives in developing the prototype procedure described in this report were:

- 1. To ensure that using organizations are involved-including groups and individuals
- 2. To reduce the workload of the Directorate of Facilities Engineering, i.e., the installation master planners, in requirements generation
- 3. To improve the completeness, accuracy, and format of requirement statements
- 4. To make procedures and forms simple and easy to use, and to make procedures as quick and economical as possible
- To recommend an overall scheme for managing local implementation of procedures and the defense of resulting requirements.

In addition, it was recognized that any procedure which would enable using organizations at an installation to generate facility requirements would have to meet the following requirements:

- 1. The procedure must relate to the existing MCA process. Figure 1 shows the procedure's potential points of impact on the MCA cycle facility delivery process. These points include preparation and review of the DD Form 1391 and PDB-1, and concept and final design reviews.
- 2. The procedure must address project-specific information rather than generic information, but the output must be presented in a format which would permit comparison with generic information. As Figure 2 shows, the design of a facility depends on these two types of information. Generic information may be characterized as requirements (qualitative statements of objectives for facilities), criteria (what the solution to a requirement is expected to be or do), or guidance (advice regarding the application of criteria in facility planning, design, or operation). Vehicles for dissemination of generic information are design Guides (DG), Technical Manuals (TM), Army Regulations (AR), Engineering Regulations (ER), etc. Project-specific information is primarily in the form of requirements; little project-specific information is in the form of criteria because of the limited construction expertise of using organizations. Primary vehicles for information transfer are the DD Form 1391 and PDB-1 documents.

- 3. The procedure must differentiate between requirements and criteria; that is, requirements must be the focus, given using organizations' expertise in this area.
- 4. The data generated by the procedure must account for the five major variables affecting mission performance. Given a mission, some functions must be delineated, and some time (scheduling) to carry out activities is necessary, as are personnel, equipment, and facilities (Figure 3). With these elements, the mission can be accomplished. Activities, personnel, equipment, and time (scheduling) are used, in turn, to aid in facility requirement formulation (Figure 4).
- 5. Factors which indirectly affect mission accomplishment, as well as those contributing directly to mission accomplishment, must be accounted for. Figure 5 portrays this distinction; additional inputs to requirement formulation come from a forecast of future demands and a consideration of needs of the individuals using the facility.

To gain a understanding of what was specifically require the process, the prototype procedure was develocations. Training Laboratory at Fort Rucket, AL, the Fort Polk Airfield Project, Fort Polk, LA, and the Personnel Services Center at Fort Sill, OK. Appendix A presents background information on these three projects.

#### Mode of Technology Transfer

The results of this study will impact TM 5-800-3<sup>1</sup> and AR 415-20.<sup>2</sup> In addition, the results will be transmitted to field users through the training materials developed for the Technology Transfer Information Package (TTIP).

## 2 PROTOTYPE DESCRIPTION

#### Overview

In the prototype procedure, missions (why an organization exists), functions (what an organization does), and activities (how an organization does what it

<sup>1</sup>Project Development Brochures: Part 1; Functional Requirements, TM 5-800-3 (Department of the Army, May 1974).

does) form the ultimate basis for requirements. It is in terms of these three elements that requirements can be defended. Those concerns which affect mission performance, security, and the health, safety, and morale of personnel are also documented to further justify requirements. Additionally, activity personnel and equipment variations over time are forecast to help prevent requirements from being obsolete at the time of facility occupancy. According to the prototype procedure, the following individuals participate in obtaining the information necessary to write requirements for a facility:

- 1. Using organization representatives, i.e., local representatives of the appropriate major command such as FORSCOM or TRADOC.
- 2. The installation master planner or a responsible representative from his/her office.
- 3. A project coordinator and liaison who serves as a "defender" of the project from the conception through occupancy. The coordinator may conduct some local training on the requirement development process for the PDB-1 (see Chapter 3).
- 4. A major command representative from the headquarters of the appropriate major command, such as TRADOC.
- 5. A representative from the Corps of Engineers District Office of the District in which the installation is located.
- 6. Representatives of the upper administrative levels of each major organizational unit which will occupy the proposed facility.
- 7. A user committee consisting of the organization representative and selected subordinate personnel.
- 8. Members of the organizational units intending to occupy the proposed facilities, and, in the case of service- or support-oriented facilities, those people outside the tenant organizations who would use the facility.
- 9. Group and individual representatives of the organizational units to use the facility, including the lowest level, e.g., section or office chiefs.

The developed prototype procedure is divided into four major phases: getting started, establishing facts, making judgments, and summarizing (Figure 6). These

<sup>&</sup>lt;sup>2</sup>Project Development and Design Approval, AR 415-20 (Department of the Army, May 1974).

four phases encompass actions on the part of the using organization from conception of a facility to the point at which requirements for the facility are forwarded to the master planner's office for preparation of the PDB-1. Appendix B presents an example of the completed information package.

#### Phase 1: Getting Started

The objective of this phase is to start the process correctly with the proper documentation of objectives for the facility, a plan of action for carrying out the rest of the process, and the identification of the potential using organizations involved. The four steps in this phase (Figure 7) are:

- 1. Recognizing the need for a facility
- 2. Stating objectives for the facility
- 3. Identifying potential using organizations
- 4. Getting groups together.

Although the first three steps are part of current master planning, they are presented here for continuity.

#### Step 1: Recognizing the Need for a Facility

The using service and the master planner determine the need for a facility. It is the using service's responsibility to decide that its operation is somewhat encumbered in current facilities. The master planner must then identify that there is no adequate space on post in which to house the using service's activities.

#### Step 2: Stating Objectives for the Facility

Stating objectives involves the using service and the coordinator. In this step the using service decides what a new facility will do for it in terms of mission performance. This task can be done jointly with the coordinator, who guides the using service in making a complete and objective statement. Also at this point, the coordinator becomes familiar with the problem to be faced in terms of defining requirements for the facility through the entire process.

#### Step 3: Identifying Potential Using Organizations

It is the using service's responsibility, jointly with the project coordinator, to decide which organizational units will be housed in the new facility. The master planner may also participate in terms of site selection to conform with the rest of the using service's missions or functions.

#### Step 4: Getting Groups Together

This step involves a meeting of the participants listed in Figure 7. The coordinator, who introduces the participants in the step, serves as moderator of the discussion, which involves verifying objectives from step 2, and forming a plan of action for accomplishing the rest of the requirement generation process. It is through the coordinator that the plan of action is written. The master planner is present primarily to provide input concerning site selection. The major command representative attends primarily to receive information and monitor the project, or to be introduced to the project if he or she has not already become acquainted with it through informal channels. The District Representative is present to become familiar with the project and its intended scope. The organization representatives help form the plan of action and decide on scheduling the remaining phases and steps.

#### Phase 2: Establishing Facts

# Step 1: Generating Mission-Oriented Activity, Personnel, Equipment and Scheduling (APES) Sets

The combination of an activity, specific personnel, related equipment, and scheduling forms a descriptive set of information which impacts facility requirements (Figure 8). These activity, personnel, equipment, and scheduling (APES) sets are the means by which an organization's mission and functions can be analyzed. They also serve as the basic building blocks of future requirements. To generate these APES sets, the coordinator must insure that the organization representatives know exactly which types of information must be gathered. The organization representative is responsible for the execution of this step. If the organization representative is a division chief, he or she will probably assign the actual data gathering in this step to individual branch or section chiefs. The coordinator can serve as a liaison within an organization to help explain to lower level organizational heads what information is needed. Forms a and b (Figures 9 and 10) are used to collect the information.

#### Step 2: Verifying Mission-Oriented APES Sets

In this step, the APES sets generated in step 1 are reviewed at the working level to verify that they are complete and accurate before being used in the rest of the requirement generation process. In this step, the coordinator informs people at the working level of their responsibility. The groups and individuals at the working level then critique the APES sets generated by the organization representatives.

#### Step 3: Identifying Indirect Mission-Oriented APES Sets

The approach required in this step is similar to that for step 1 in this phase, but the focus is somewhat different. Individuals performing activities (often requiring supportive equipment) that must occur regardless of the mission may not be identified through mission-oriented APES sets. How these individuals are identified and how data are obtained from them is described in the Formulating Other Than Mission-Based Requirements section, p 11.

#### Step 4: Verifying Indirect Mission-Oriented APES Sets

This verification is performed by groups and individuals in the below-supervisory chain as in step 2. For service- or support-oriented facilities, this step can be accomplished by eliciting information from nonresident facility users. Again, the coordinator serves as advisor and, in some cases, may perform training required to accomplish this step.

#### Phase 3: Making Judgments

# Step 1: Reviewing Phase 2 Data for Organizational Effectiveness and Efficiency

The complete description of the functions and activities of each organization which will use the facility that results from phase 2 should be forwarded to the highest administrative level within the particular organization at the installation for review of organizational effectiveness and efficiency (Figure 11). Since facility requirements are based on what is done and how it is done, any ineffective or inefficient procedures that may have developed over time, possibly resulting from personnel changes, could be given a formal physical form—the facility. In-depth review of these functions and activities during this step could prevent inappropriate facility requirements. For sufficiently complex organizations, the Organizational Effectiveness Office on the installation can be consulted.

# Step 2: Identifying Special Concerns in Terms of "Needs"

In this step, all of the APES sets generated and verified to date are forwarded to groups and individuals for comments based on four categories of concern ("needs"): (1) satisfaction, (2) task performance, (3) security, and (4) health and safety. Comments are recorded in the space provided on form b. Organization representatives are responsible not only for providing their insights to these concerns but also for insuring that subordinate groups and individuals accomplish their responsibilities. The coordinator, again, acts in an advisory capacity.

#### Step 3: Identifying Future Impacts

In this step, key installation personnel look at the APES sets and the "special concerns" and try to project the future impacts on these APES sets and concerns. Questions to be answered include whether activities will no longer be performed in 5 years; whether more activities will be performed; if the facility is technologically oriented; whether a new generation of technology and subsequent equipment will place additional or different demands on the facility. This step is performed in a panel discussion, with the coordinator acting as an advisor and moderator. Upper level administrative representatives from the organizations are the key people in the forecasting effort. On occasion, representatives of organizations which have a direct effect on the using organization's operations may be present. The master planner may provide information concerning future plans for sites adjacent to the facility in question. The user committee, which represents all organizations impacted by the facility and all supervisory levels, may be present. Results are recorded on form c (Figure 12).

#### Step 4: Naming Spaces

In step 4, APES sets are assigned to spaces in the facility. This involves many judgments by numerous people, including deciding which APES sets are compatible and which are not in terms of (1) the activities being compatible, (2) the number of tasks performed by the personnel, and (3) the equipment types being compatible. For example, a clerk-typist located in a room where reports are edited could cause considerable noise. These two activities—editing and typing—are not necessarily compatible because of the noise problem. The problem can be solved by abating the noise at the source or by locating the typist and editor in separate spaces. This concern is the type that is important in step 4.

Form d (Figure 13) provides a record of special data for equipment. This information can serve as input for the tasks of naming spaces and deciding on requirements (step 6). Form e (Figure 14) identifies commonuse spaces and the organizations' usage of them. For example, conference spaces in administrative facilities can be shared by several organizations if they are properly sized and their use is accurately scheduled. Lobbies and waiting areas can also be shared. Form f (Figure 15) is used only to name the spaces and indicate which APES sets are assigned to each. The coordinator serves as an advisor. The primary responsibility for this step falls on the organization representatives.

#### Step 5: Deciding on Space Adjacencies

This step is performed by the organization representatives and group and individual representatives in conjunction with the coordinator. Results are recorded on form f (Figure 15). Considerations, some of which were already contemplated in step 4, would be work load, managerial style, efficiency, communications, security, etc. Once the adjacencies have been decided on in the matrix, a simple bubble-diagram is drawn (form g, Figure 16).

#### Step 6: Stating Requirements for Spaces

Once spaces have been defined by their APES sets and named, their requirements must be stated. Consideration must be given to such variables as acoustics, lighting requirements, and space requirements (form h, Figure 17). This step is performed by the organization representatives and the group and individual representatives in conjunction with the coordinator.

#### Step 7: Verifying Steps 4 Through 6

In conjunction with the coordinator, the results of steps 4 through 6 are forwarded by the organization representatives to their subordinates for concurrence. Once this task has been done for all of the lowest level organizational units to use the facility, the organization representatives at this lowest level (e.g., section or platoon) meet with the representative at the next highest level (e.g., branch or company) to determine functional relationships among spaces within that higher organizational level. This procedure is iterated up the organizational hierarchy until the functional relationships among all organizations to use the facility are determined.

#### Phase 4: Summarizing

Step 1: Summary to Director of Facilities Engineering (DFAE)

The organization representatives and the coordinator are responsible for presenting a completed facility requirements document incorporating all previously gathered information, in a format consistent with the needs of designers and other decision-makers, to the installation master planner (Figure 18).

#### Step 2: Writing the PDB

It is the responsibility of the master planner to write a PDB-1 for the facility based on the document evolved in step 1. This document is to be forwarded to the coordinator and organization representatives for concurrence before being sent to the major command for approval.

#### Formulating Other Than Mission-Based Requirements Background

Occupants. The previous discussion focused on formulating requirements for organizations which occupy a facility. However, organizations are not the only occupants of a facility. Occupants also include individuals and groups of people who would not be identified as a unit within an organization. Included here might be lunch-hour joggers, the physically handicapped, women, etc. Requirements for such groups and individuals must also be generated.

Needs. In the previously described procedures for generating facility requirements for organizations, it was recognized that the primary need of an organization is task performance—being able to complete the operations which are necessary to accomplish its mission. Other needs for an organization might include security or economy. For groups and individuals, needs include not only being able to perform tasks or activities which are necessary or preferred, but also being safe, secure, and healthy, and having a sense of achievement or satisfaction.

Activities, Personnel, Equipment, and Time as the Basis for Requirements. The previously discussed principle of generating facility requirements from detailed information on the activities, personnel, equipment, and time factors relevant to the organizational element being examined also applies to generating facility requirements for groups and individuals not clearly identified when analyzing an organization.

Direct and Indirect Mission-Oriented Activities. In formulating requirements for facilities based on accomplishment of organizational missions, a mission analysis procedure is used to break the mission down into functions and then into activities. These activities could be referred to as direct mission-oriented activities. However, a facility must also accommodate other group and individual activities, including activities that must be performed by everyone, such as eating, drinking, and toilet activities, as well as activities which people do in varying degrees depending on individual interest or desire, such as socializing, observing the natural world, moving about, and observing other people. In many situations, activities are demanded by society or its laws regarding health and safety; in most organizations, standards have been established which govern the degree to which certain activities are accommodated. For example, the organization provides separate bathrooms for male and female employees, wide doors and ramps for the handicapped, an office lunchroom or cafeteria, and often a shower room. These group or individual activities, which are based on needs for health and safety, security of personnel and personal belongings, morale, and satisfaction, may contribute indirectly to the accomplishment of the organizational mission and therefore are referred to as indirect mission-oriented activities.

General and Locally Specific Requirements. General, or generic, requirements are those based on activities which are universally performed across organizations, installations, or areas of the country; these requirements are usually handled through some centrally developed and controlled document. These generic requirements and the criteria for achieving solutions for them include such things as standards for toilet facilities, accommodations for women, standards for disabled people, etc. On the other hand, locally specific requirements are those which are based on activities or other factors which are unique to a region of the country, installation, or organization. The procedures for developing facility requirements must include the ability to identify those requirements which have already been formulated as generic requirements and are documented elsewhere in ARs, ERs, and TMs. It would be inefficient and uneconomical to redevelop existing generic requirements for each new facility. However, where generic requirements do not exist, or where activities are locally specific, requirements must be developed

#### Procedures

With these background considerations in mind, procedures for generating requirements which do not result directly from a mission analysis can be discussed. Procedures for dealing with activities which contribute indirectly to mission accomplishment are more difficult to complete than those which contribute directly. Several judgments are involved, with a wide variety of methods being available for collecting the activity, personnel, equipment, and time data.

In the approach for generating requirements for organizations illustrated in Figures 4 and 5, mission analysis is used to generate the APES data, which are then used to formulate the requirements for a facility to accommodate them. Figure 19 expands this idea to show how requirements for groups and individuals can be generated in a parallel manner.

The model shows that two initial judgments are necessary in dealing with groups and individuals and the related activity, equipment, and time factors. The first judgment is identifying whether there are any indirect mission-oriented factors to be considered. The second judgment is to classify these identified factors as either generic or locally specific. Assistance in making these judgments could be provided by a checklist of groups and individuals, or one for activities, equipment, or scheduling.

Once it has been determined that there are factors for which local data must be collected, numerous issues relative to the execution of data collection arise:

- 1. Can the data be collected given local expertise, and, if so, how?
  - 2. Which data collection method is best?
- 3. How much time, money, and manpower must be devoted? Are these available?
- 4. How can data be reduced? What are the available tools and procedures?
- 5. How are the findings from data reduction to be interpreted?
- 6. How can requirements be formulated from the findings and fed back into the total facility requirements?

Subsequent phases of this research project will address these issues and develop efficient and effective means of collecting sufficient activity, personnel, equipment, and time data for indirect-mission analysis so that requirements for the facility can be identified.

#### Examples From Test Projects

The three test cases used to develop procedures for using organizations to formulate facility requirements offer some examples of items which did not emerge directly from a mission analysis. In the Fort Polk Airfield case one consideration arose from an activity, while in the project at Fort Sill a significant group who would be using the facility was not covered by the mission analysis. While other items could be cited, these two will be discussed briefly.

When formulating the requirements for the Fort Polk Airfield, several people recognized the need for a place to eat. Nearly 500 people would be stationed at the airfield, which is about 1 1/2 miles (2.4 km) from the main post area, where the nearest eating facilities

were available. However, there was no information available suggesting what the current eating patterns were for those stationed at the airfield, what kind of food service was desirable, or what kind of food service would be utilized. To gather some data on current eating patterns and kind of food service desired (activity) and what the projected utilization might be for various types of food service (personnel and scheduling), a short questionnaire was composed and circulated to personnel working at the airfield (Appendix C). Using the results from this evaluation and the knowledge of what was economically feasible, the local Post Exchange Service was able to identify what type of service would be offered, the equipment which would be used, and the hours food service would be available. On the basis of these activity, personnel, equipment, and scheduling data, the requirements for eating accommodations were formulated.

The main purpose of the facility used as a test case at Fort Sill was to provide one-stop processing for permanent-party personnel. However, because the personnel who would be served by this facility did not constitute a formal organization, their needs could not be identified by a mission analysis procedure. Therefore, a small study involving interviews, observations, and questionnaires was conducted to determine what the typical sequence of activities for processes was and how the needs of this group should be accommodated (Appendices D and E). One of the significant results was determining where the waiting time usually occurred, where waiting spaces should be placed, and about how many chairs should be provided.

## 3 TRAINING

If the requirements generation process for the PDB-1 is to flow smoothly—thus ensuring continuity and quality across projects, installations, and Districts—all participants must have some training in specified topics. The extent of training required will vary. The project coordinator, for example, will require an intimate knowledge of the entire requirement generation process. Groups and individuals will require minimal training at specified points in the process, however, for their tasks usually do not generate information but verify information gathered by someone else.

The following sections generally describe the training required by groups and individuals in each phase of the procedure.

#### Phase 1: Getting Started

Step 1: Recognizing the Need for a Facility

CERL has recommended<sup>3</sup> that an objective means of identifying whether or not a facility is functioning in terms of habitability be developed. Habitability is a relatively broad issue which encompasses nearly every functional consideration for a facility. If this procedure is developed, it will aid in recognizing whether a new facility is needed by identifying the shortcomings in current facilities. In this step, the using service and the master planner would have to evaluate their existing facilities to determine whether a new facility is needed or whether current facilities can be modified. Therefore, the using service and master planner must be trained in this process before a DD Form 1391 is written for a new facility.

#### Step 2: Stating Objectives for the Facility

Since the using service representative and the coordinator are the only people involved in this decision, training is limited to them. Since stating the objectives for the facility may also be a part of the procedure described in step 1, training for step 2 should be concurrent with that for step 1.

#### Step 3: Identifying Potential Using Organizations

Identifying potential using organizations is contingent on the organizational structure itself. Compatible (in terms of the objectives for the facility) organizational units would most likely be housed in a new facility, so which organizational units are most compatible in terms of mission must be determined. This procedure requires minimum training for the coordinator and the using service; training is not required for the master planner, who is also involved.

#### Step 4: Getting Groups Together

At this point, the coordinator becomes a trainer in the sense of developing a strategy and timetable for the completion of the process and for assigning tasks. The master planner, major command representative, District representative, and organization representatives must be briefed concerning what will be required of them, when it will be required of them, and in what form their information must be presented. At this point, the coordinator will probably train the organization representatives on the use of each of the forms that will be necessary for the completion of the process. Appendix B presents examples of completed forms.

<sup>&</sup>lt;sup>3</sup>R. L. Brauer and D. L. Dressel, Concepts for the Generation, Communication, and Evaluation of Habitability Criteria, Special Report D-78 (U.S. Army Construction Engineering Research Laboratory, 1977).

#### Phase 2: Establishing Facts

Step 1: Generating Mission-Oriented Activity, Personnel, Equipment and Scheduling (APES) Sets

From step 4 in phase 1, the coordinator and organization representatives have already been trained on the use of all necessary forms and procedures for generating APES sets. Organization representatives who are division chiefs or of similar level will be required to train the branch or section chiefs who will actually be gathering the information on appropriate procedures and forms necessary to execute this step. This task can be done in conjunction with the coordinator.

#### Step 2: Verifying Mission-Oriented APES Sets

Since this step involves primarily the coordinator, who has been trained in the entire process, he/she can be most useful in telling the groups and individuals who are examining the APES sets how to insure that their critiques are accurate and complete.

Step 3: Identifying Indirect Mission-Oriented APES Sets

The training required for this step is similar to that required for step 1 in this phase.

Step 4: Verifying Indirect Mission-Oriented APES Sets
In this step, the information from step 3 is both verified and quantified. This procedure is not complex, but it must be thorough. The groups and individuals must be taught appropriate means of critiquing those indirect mission-oriented APES sets developed in step 3 and use of the appropriate vehicle for making comments and additions to these. This training can probably be done solely on the basis of forms, with minimal faceto-face training from the coordinator.

#### Phase 3: Making Judgments

Step 1: Reviewing Phase 2 Data for Organizational Effectiveness and Efficiency

Since the input for this step is primarily from the highest level administration at the installation for the organization in question, organizational and managerial skills have presumably already been developed. Thus, no special training is required for this step.

Step 2: Identifying Special Concerns in Terms of "Needs"

Once again, although the organization representatives are primarily responsible for accomplishing this step, it is the groups and individuals who provide the input. Training these groups and individuals on how to critique all the APES sets that have been developed in terms of the four categories of evaluation described in Chapter 2 will be necessary.

#### Step 3: Identifying Future Impacts

This step, overseen by the coordinator, involves the input of organization heads. Any instructions can be informally or verbally provided by the coordinator, or merely preprinted on data forms.

#### Step 4: Naming Spaces

This step is the most complex one in the process. It requires judgment based on previously gathered data. Execution of this step requires considering many variables simultaneously to identify compatible APES sets for inclusion in a specific space in the facility. Training required will be on the variables to be considered, such as communication; these variables will have to be defined. The coordinator will be the primary trainer, and the organization representatives and group and individual representatives will require the training. Some of this training may be included as instructions in the printed form, although much of it will have to be informal.

#### Step 5: Deciding on Space Adjacencies

Again, this is primarily a judgment step, as in step 4. It requires the same type of training for the same people. It is merely dealing with a higher-order element of the facility.

#### Step 6: Stating Requirements for Spaces

A guidance package must be included as part of the process so that the organization representatives and the groups and individual representatives can look at the APES sets in each space and develop the requirements compatible for all included APES sets in terms of ventilation, acoustics, lighting, etc. Generic documents in the TM, ER, and AR series can aid in this step and will be introduced through training to the organizing representatives and groups and individual representatives.

#### Step 7: Verifying Steps 4 through 6

The coordinator can be the primary trainer of the groups and individuals who must perform this step. The procedure for verifying the organization of APES sets in spaces, the requirements stated for the spaces and the space adjacencies must be communicated to the groups and individuals before this step can be accomplished. This information exchange, or the procedure for accomplishing this step, may take place informally. It is not likely that the instructions for this step can be communicated solely by printed materials.

#### Phase 4: Summarizing

Step 1: Summary to DFAE

In this step, the organization representatives and the coordinator will require primarily preprinted forms on which to put all updated information for forwarding to DFAE (i.e., master planner). No specialized training will be required.

#### Step 2: Writing the PDB

Instructions for PDB completion already contained in TM 5-800-3 will merely have to be supplemented to include the requirement data added by the preceding process.

# 4 IMPACT OF THE STUDY ON THE SCOPING OF FACILITIES AT THE THREE TEST SITES

As originally planned and documented on the DD Form 1391, the Fort Polk Airfield Operations Building was programmed at 11,200 sq ft (1040 m²). The functional requirements analysis showed that 26,800 sq ft (2490 m²) were actually needed; some operations which needed to be housed in this facility had been overlooked. Also at Fort Polk, the Airfield DS Maintenance Hangar was originally programmed at 32,600 sq ft (3029 m²), but the analysis showed that 16 percent less space (27,230 sq ft [2530 m²]) was needed.

At Fort Sill, the use of the functional requirements process for the Personnel Services Center resulted in a reduction of programmed space from 190,000 sq ft (17,651 m<sup>2</sup>) to 57,500 sq ft (5342 m<sup>2</sup>). Part of this

discrepancy resulted from deleting several marginally important (in terms of the objective for the facility) organizations from the facility.

### 5 CONCLUSION

This report has described a prototype procedure developed in the first phase of an ongoing study to develop tools and procedures for organizations at the installation level to use in formulating functional requirements for facilities in the Military Construction, Army program. The procedure consists of four phases—getting started, establishing facts, making judgments, and summarizing. Numerous personnel representing a variety of organizations participate in the individual steps of each phase, with an overall coordinator participating throughout the process. Varying degrees of training will be required for the individual participants in the process.

The functional requirements generation procedure described in this report will establish project scope and additional details on the project. Efficiency would be increased, however, if a streamlined process was developed to establish project scope on the DD Form 1391s, leaving the more detailed analysis until later in the MCA process, when there is a higher level of confidence that the facility will be authorized for design and construction. The development of a streamlined process is planned as future work.

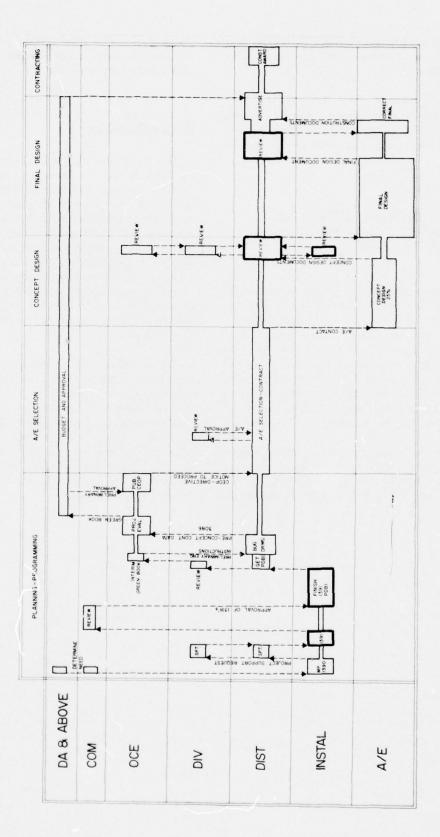


Figure 1. MCA cycle facility delivery process.

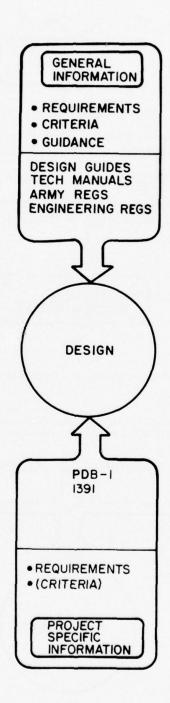


Figure 2. Information for design.

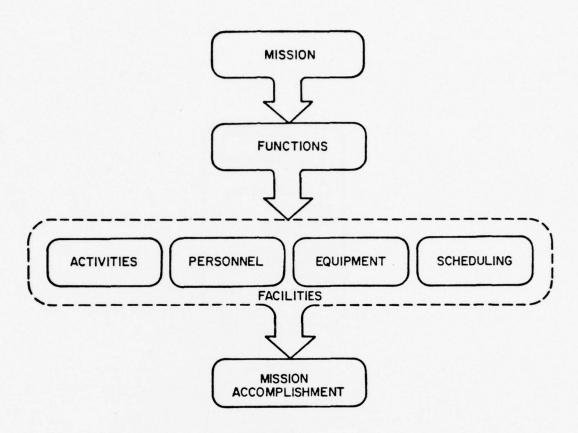


Figure 3. Elements necessary for mission accomplishment.

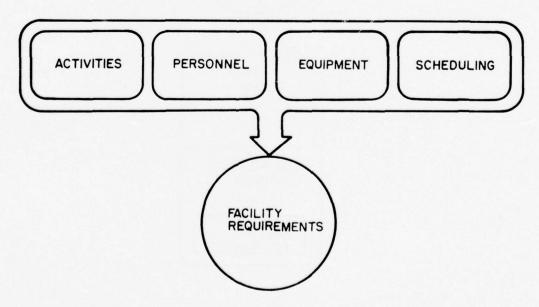


Figure 4. Elements of mission accomplishment used in requirement generation.

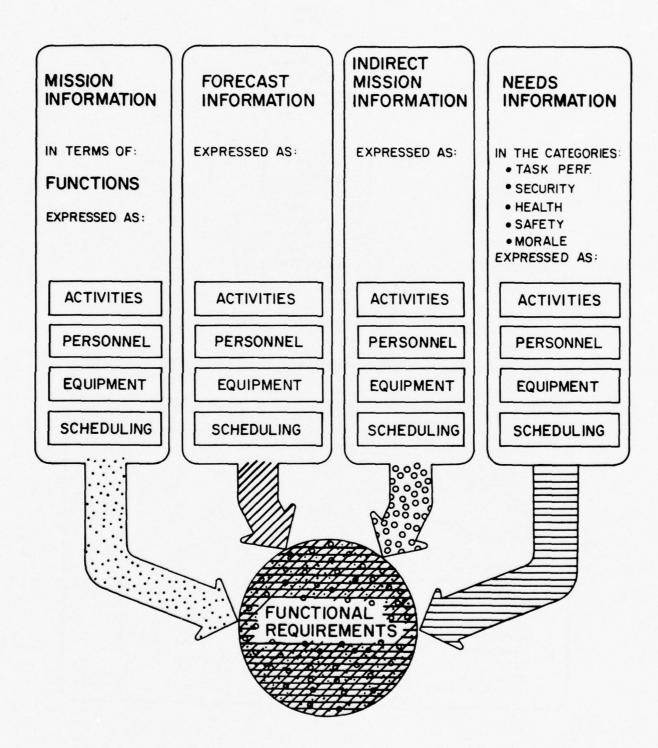


Figure 5. Types of information used in functional requirement formation.

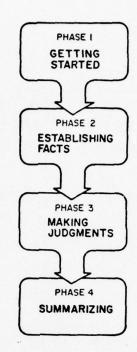


Figure 6. Phases in the prototype requirements generation process.

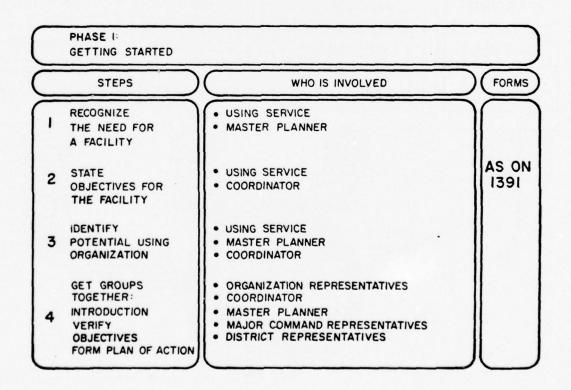


Figure 7. Steps in phase 1: getting started.

PHASE 2: ESTABLISHING FACTS		
STEPS	WHO IS INVOLVED	FORMS
GENERATE MISSION- ORIENTED ACTIVITY, PERSONNEL, EQUIPMENT,	COORDINATOR     ORGANIZATION REPRESENTATIVES	a,b
AND SCHEDULING (APES) SETS VERIFY MISSION- ORIENTED APES SETS	COORDINATOR     GROUPS AND INDIVIDUALS	a,b
3 IDENTIFY INDIRECT MISSION - ORIENTED APES SETS	• COORDINATOR • ORGANIZATION REPRESENTATIVES	
 VERIFY INDIRECT  MISSION - ORIENTED  APES SETS	COORDINATOR     GROUPS AND INDIVIDUALS	

Figure 8. Steps in phase 2: establishing facts.

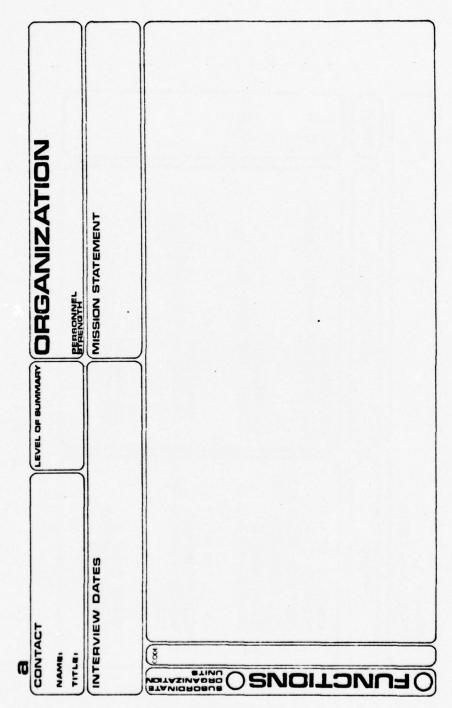


Figure 9. Form a.

Figure 10. Form b.

	STEPS	WHO IS INVOLVED	) FORMS
ı	REVIEW PHASE 2 DATA OR ORGAN- IZATIONAL EFFEC- TIVENESS AND EFFICIENCY	• COORDINATOR • ORGANIZATION HEADS	a,b
2	IDENTIFY SPECIAL CONCERNS IN TERMS OF "NEEDS"	ORGANIZATION REPRESENTATIVES     COORDINATOR     GROUPS AND INDIVIDUALS	b
3	IDENTIFY IMPACT OF THE FUTURE	COORDINATOR     MASTER PLANNER     ORGANIZATION HEADS	С
4	NAME SPACES	COORDINATOR     ORGANIZATION REPRESENTATIVES     GROUP AND INDIVIDUAL     REPRESENTATIVES	d,e,f
5	DECIDE ON SPACE ADJACENCIES	COORDINATOR     ORGANIZATION REPRESENTATIVES     GROUP AND INDIVIDUAL     REPRESENTATIVES	f,g
6	STATE REQUIREMENTS FOR SPACES	COORDINATOR     ORGANIZATION REPRESENTATIVES     GROUP AND INDIVIDUAL     REPRENTATIVES	h
7	VERIFY STEPS 4-6	COORDINATOR     GROUPS AND INDIVIDUALS	d-h

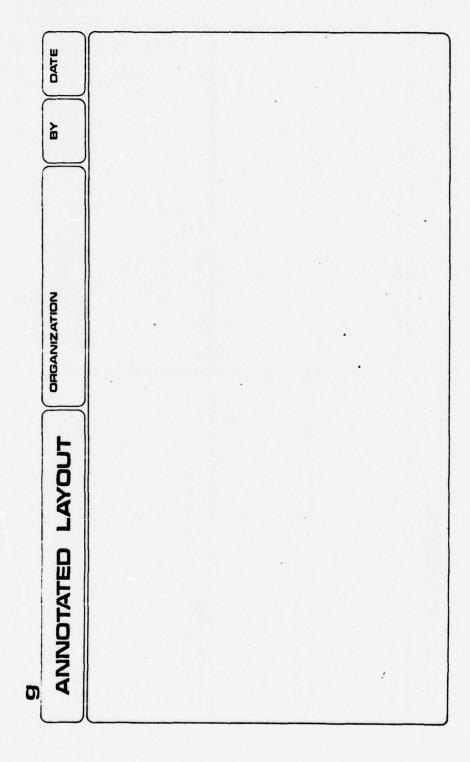
Figure 11. Steps in phase 3: making judgments.

Figure 12. Form c.

Figure 13. Form d.

Figure 14. Form e.

Figure 15. Form f.



REQUIREMENTS ORGANIZATION/SPACE	N/SPACE BY	DATE
GENERAL (Security, Privacy, Etc.)	UTILITIES (Sewer, Mater, Fire Protection, Etc.)	
ENVIRCONMENTAL (Heat, Light, Sound, Ventilation, Etc.)		
AACHITECTURAL (Appearance, Surfaces and Finishes, Doors and Windows, Etc.)	OTHER (Communication, Etc.)	
NEED CIDE: Nnecessary, lack of seriously impairs function IImportant, lack of impairs function Hhelpful, lack of slightly impairs function	PURPOSE CODE: 1activity or function performance 2health or safety 5equipment performance 3morale 6other a 4security	erformance

Figure 17. Form h.

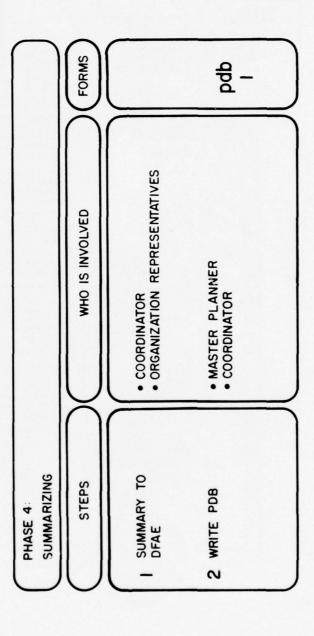


Figure 18. Steps in phase 4: summarizing

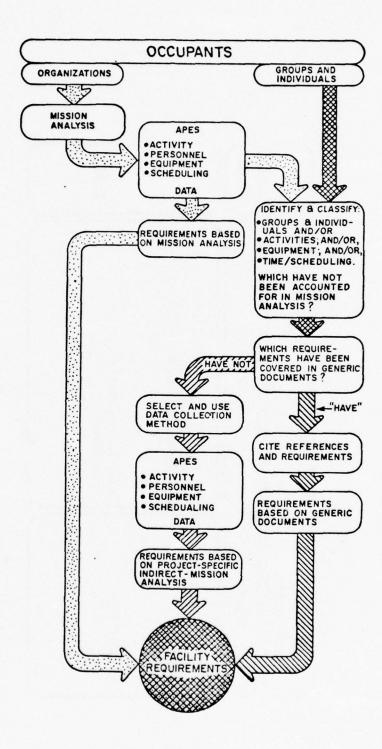


Figure 19. Formulation of requirements for groups and individuals compared to requirements for organizations.

#### APPENDIX A:

# DESCRIPTION OF FIELD DEVELOPMENT OF LOCATIONS

#### Tactics Training Laboratory at Fort Rucker, AL

The Tactics Training Laboratory provides the aviation student with a working knowledge of military tactics and techniques required to carry out the most effective modern operations. Highly specialized simulation techniques are used for the training. Only one organization will use the facility—the Directorate of Academic Training. Total personnel load on the facility will be approximately 15 instructors, with the number of trainees varying from year to year.

#### The Fort Polk, LA Airfield Project

The airfield at Fort Polk will service organizations organic to Fort Polk and units within the tenant 5th Infantry Division (mechanized), as well as some flights by a commercial airline. A total of 19 organizational units, comprised of 66 aircraft and numerous resident personnel, will use the airfield.

#### The Personnel Services Center at Fort Sill, OK

The proposed Personnel Services Center would provide a permanent centralized processing capability for more than 12,000 processees per year. In addition to permanent-party processing, the facility would be a one-step services center for personnel at Fort Sill. Thirty-four organizational units are designated to use the facility.

APPENDIX B:

**EXAMPLE FORMS AND INPUT DATA** 

ACCEPTANCE & SUPERWISION OF ALL WORK OCTERS FOR MAINTENANCE RECENED FROM LINITS. E CO 705TM; PRODUCTION CONTROL SECTION ORGANIZATION MISSION STATEMENT LEVEL OF BUMMARY SECTION STOCK DIRCRAFT PARTS OT 710 C 53 , DI VILL FI , 07 242 61 ADMINISTRATION MAINTENANCE NAME: 54T. POMIDER INTERVIEW DATES CONTACT D. J ٥ (3 TITLE FUNCTIONS O SNOITONUT

ORGANIZATION	FUNCTION	ACTIVITY PERBONNEY EQUIPMENT SCHEDULNE	1. FILL-IN WEEK (1) E4 (5) DESKS NITH OUDER REGISTER (1) 02 (1) 02 (1) 04. DELMEN OUD SES, (1) E6 (1) E6 (1) FREWRIER (1) FAREWRIER	3. E-TIMELIAH CONTRACTOR (2) 4/49' SULLENN CONECUTES IN CONECUTES IN CONECUTE CONECU	4. CCCEDIMATICAL (1) E4 DAME A5. LOCKER MITH GUALITY (1) E4 DAME A5. LOCKER (1) TUB FILE ON GENTROL STRUD	S. COCKDINATION WITH SECRETE (1) E4 CIDENT (2) 2-LINE PROBLE CO SECURITY OF ACCURATION	T. MANTRAN DOC- (1) E5 (2) DEGLE WITH ULAST RELINSTEE (1) E4 (1) FREWBITEE (1) FREW STOCK (1) FREW TRUE (1) FREW STOCK (1) FRE	8. PRITHINGS SER "Convolute" Suest
E CO TOSTH : PRODUCTION CONTROL SECTION	A. ADMINISTRATION	CHEDULING			CONVERSE LATO FORMED PAPERNORY ON SECTIONS WILLY PROCESS.	FORNARD ANY PAPERNCE BEQUIRED ON VIEDED PARTS		

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FUNCTION				B. MAINTENANCE
ACTIVITY	PERSONNEL EQUIPMENT SCHEDULING	EQUIPMENT	BCHEDULING	COMMENTS
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2. VISIBL IN-	(1) E6 - 1264E 45 POR (1-1, 10-2, 10-4			

ORGA	ORGANIZATION	ZOL	ш	E CO TOSTH: PRODUCTION CONTROL SECTION
FUNCTION				C. STOCK AIRCRAFT PARTS
ACTIVITY	PERBONNEL	PERBONNEL EQUIPMENT SCHEDULIN	SCHEDULING	COMMENTS
L. STOCKS AND WAINTAINS AIR- CRAFT FACTS	A-7	PARTS BAND: (6'x 18' x 10')		

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	COMMUNICIA-USE SPACES		E CO TOSTH: PECCUCTION CONTROL SECTION
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	WEELLY	12 people	ALL CAN BE DONE IN AN OVER-SIZED
	HULLINGW	& pecde	) VECTICAL CONTROL CYFICE

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<b>A</b>	ADJA	<u>/-</u>	2,0	(S)			X	X	X	X				
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# REQUIREMENTS

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DATE

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• 1100 FOR OFFICE EQUIPMENT AND SUPPLEMENTAL LIGHTING (N.1,5) UTILITIES •LOCKARDLE ENTRIES WILES OFFICE IS NOT STAFFED(N-1) DENEHAL

# ENVIRONMENTAL

• DIR CONDITIONUING AND HEATING (I-2,3)

• SOUND CONTROL FROM HANGAR AND OUTDOORS (I-1,2)

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# ARCHITECTURAL

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5---equipment performance 6---other a 1--activity or function performance 2--health or safety 5--equipme 3--morale 6--other 4---security PURPOSE CODE:

M--necessary, lack of seriously impairs function I---Important, lack of impairs function H---helpful, lack of slightly impairs function MEED CODE:

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### APPENDIX C:

## QUESTIONNAIRE CONCERNING FOOD SERVICE AT FORT POLK AIRFIELD

INII	RODUCTION	Ft. Fabout	Polk Airfield t the need fo ized. Your c	, we would like to r a snack bar and	o obtain your opinions how well it might be ciated and will not be
INS	TRUCTIONS	unit Avia	commander.		and return it to your ompiled by the Post lating facility
١.	Is your usu	ual di	uty station a	t the airfield?	YesNo
2.	When you ar	re on	duty at the	airfield, <u>FOR MEA</u>	LS how frequently
			Every Day	Usually, but not every day	Seldom, Once per week or less
a)	carry your	own?			
0)	leave the a				
2)	skip eating	g a			
1)	buy from vendor truc	ck?			
3.	When you ar	re on do yo	duty at the	airfield, <u>FOR COF</u>	FEE BREAKS how
			Every Day	Usually, but not every day	Seldom, Once per week or less
a)	carry your	own?			
)	leave the a				
:)	skip a coffee brea	ık?			
1)	buy from vendor truc	k?			

4.	In your opinion, how necessary would it be to have a snack bar at the Ft. Polk airfield?
	NecessaryUnnecessary
5.	If a snack bar were provided, how often would you use it for <pre>coffee breaks?</pre>
	a) Almost all of my breaks
	b) Maybe once a day
	c) Almost every day
	d) Once or twice a week
	e) Very seldom or never
6.	If a snack bar were provided, how often would you use the following type of services for $\underline{\text{meals}}$ ?
	Type of service Frequency
	Daily every day twice a week or never
	a) Drinks and snacks to supplement a sack lunch?
	b) Cold sandwiches
	c) Hot sandwiches
	d) Full meals
7.	In your opinion, what is the main reason a snack bar should be located at the airfield?
Tha	nk you for your time and efforts in completing this questionnaire.

### APPENDIX D:

## FORT SILL OCCUPANT/PROCESSEE QUESTIONNAIRE

Is your fa	amily with your?YesNoHave none
If yes: v	where will they stay until you get housing?
How many p	posts have you processed before Ft. Sill?
What is us new post?	sually the biggest problem foryou when you process <u>into</u> a
(where all you rank t	lowing services were included in a one-step processing centering in-processing could be completed in one building), how work them in order of importance to you? That is, if pay were my you would rank it "l", then say personnel as "2" and so on
	ik them all.
	Army Community Services  Babysitting/Nursery Barber Shop Education Housing Human Resources (including Chaplain, etc.) I.D. Cards Pay Personnel
	Army Community Services Babysitting/Nursery Barber Shop Education Housing Human Resources (including Chaplain, etc.) I.D. Cards Pay
	Army Community Services  Babysitting/Nursery Barber Shop Education Housing Human Resources (including Chaplain, etc.) I.D. Cards Pay Personnel PX Cafeteria Red Cross Transportation

### APPENDIX E:

FORT SILL QUESTIONNAIRE FOR UNIT FIRST SERGEANTS

The installation is considering the construction of a new facility at Fort Sill which is to be a Central Processing Center. The purpose of such a facility would be to provide all the services necessary for enlisted processing in a single building. We are trying to collect as much information as possible from those persons who deal with processing and processees. Would you complete the following pages as accurately as you can and return the completed form as instructed. Thank you.

procedures	not to housing	be confus	laint you hear regarding processing ed with the problems of the processee like waiting in line or transportation
personne?	have to the frequ	leave the ency with	ignment, you hear many reasons that new unit to finish processing. Would you which you hear the following excuses (check
Most New People	Some New People	Few New People	
			Army Community Services
			Education
			Housing - are you able to estimate:% on-post
			Personal problems where they want to see a Chaplain, Drug & Alcohol Counselor, Lawyer, Red Cross, etc.
			I.D. Cards
			Finance Office
			Personnel Office
			Transportation Office for Housing Goods
			Vehicle and/or Weapon Registration

Are there any reasons why a Central Processing Center would be a disadvantage?
If the following services were included in a one-step processing center (where all processing could be completed in one building), how would you rank them in order of importance? That is, if you think that Pay is most important, you would rank it "l", maybe Personnel as "2", and so on. Please rank them all.
Army Community Services Babysitting/Nursery Barber Shop Education Housing Human Resources (including Chaplain, etc.) I.D. Cards Pay Personnel PX Cafeteria Red Cross Transportation Vehicle/Weapon registration and inspection
Are there any services that are <u>not</u> on the above list that should be included in a processing center? How important are they?
In what ways would you see a Central Processing Center make things easier for you? Are there any cost savings you would care to estimate?

Within a week new personnel	of initial assignment to your unit, what percent of the have to leave the unit area to complete processing?
A. B. C. D. E.	0-20% 21-40% 41-60% 61-80% 81-100%
a Central Prod	do you think would be saved per individual if there were cessing Center? In other words, how much sooner could t individual on full-time duty?
A. B. C. D.	A Central Processing Center would make no difference Maybe one work day A couple of work days Up to a week of work days More than a week of work days
	COMMENTS

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